Proposed Addition to Administrative Schedule 20 - <u>WEBSITE RECORDS</u>

<u>Web Management Records</u>

1.　　Record Series:　**Guidance Documents**

　　　　Description:　Editorial guidelines and recommended practices for Web sites which are not included in official policies and procedures. These include, but are not limited to, records that describe style, content, posting processes, design principles, acceptable use of site name and logo, technical standards, access control, quality assurance, and records management.

　　　　Instructions:　**Destroy when superseded or obsolete.**

2.　　Record Series:　**Web Administration Files**

　　　　Description:　Correspondence, reports, meeting minutes, and studies relating to the overall development, construction, and management of Web sites, or those used to explain, illustrate, or govern how the sites (or any of their components) are administered. These include, but are not limited to, strategic plans, annual reports, funding letters, and budget reports.

　　　　Instructions:　**Destroy when 10 years old.**

<u>Web Site Technical Operations Records</u>

3.　　Record Series:　**System Software**

　　　　Description:　Software used to create and maintain the site and support specific applications.

　　　　　　a.　**Software applications used to place the site online ("server software") and server environment configuration specifications.**

　　　　　　Instructions: **Destroy when superseded by routine software updates or when system is removed from service, whichever is sooner.**

　　　　　　b.　**Software configuration files used to operate the site and establish its "look and feel" including scripts and applets.**

　　　　　　Instructions: **Destroy when superseded by routine software updates or when system is removed from service, whichever is sooner.**

      c.   **Documentation relating to software applications, including system specifications, files specifications, data dictionaries, record layouts, user guide, and output specifications.**

          Instructions: **Destroy or delete when superseded or obsolete.**

      d.   **Analysis of off-the-shelf commercial products and description of any customization.**

          Instructions: **Destroy 5 years after completion of analysis.**

Web Site Production and Project Management Records

4.   Record Series: **Web Site Management and Design Files**

     Description: Records that relate to the management of a Web site, including significant correspondence (email and hard copy), notes from page design meetings, draft versions of the site, reports, site change documentation, purchase orders, cost reports and all other aspects of Web site management not covered elsewhere in this schedule.

     Instructions: **Cut off annually. Destroy or delete 3 years after cutoff or 1 year following removal of site, whichever is earlier.**

5.   Record Series: **Web Records Inventory Form/Historical Log**

     Description: This form is used to document aspects of the Web site pertinent to the records management function and serves as a historical log for the site. It documents the following information:

       a.   Contact information
       b.   Web site name and full URL
       c.   Date site was posted on the Web
       d.   Date site was removed from the Web
       e.   Design and graphic information
       f.   File formats
       g.   Programming/scripting languages
       h.   Interfaces or databases
       i.   Site contents
       j.   Archival storage location
       k.   Access restrictions
       l.   Site description
       m.   Originality of information
       n.   Review confirmation

Instructions: **Permanent. Cut off annually. Offer to NARA after 25 years.**

6.   Record Series: **Graphics**

         a   **Graphic design drafts.**

         Instructions: **Destroy or delete when no longer needed.**

         b   **Stock graphic images.**

         Instructions: **Destroy or delete when no longer needed.**

7.   Record Series: **Legal Reviews and Approvals**

    Description: Sign-offs, legal clearances and copyright releases specific to a Web site.

    Instructions: **Permanent. Cut off annually. Offer to NARA after 25 years.**

8.   Record Series: **Access/User Statistics**

    Description: This information may be used to track customer interest and monitor site traffic.

         a.   **Access statistics including "hits" and number of unique users.**

         Instructions: **Retain for 2 years following removal of the site.**

         b.   **User information collected from user feedback forms, including, but not limited to: name, organization, email addresses, and areas of interest.**

         Instructions: **Destroy or delete when no longer needed for reference.**

9.   Record Series: **Work Orders/Recharges**

    Instructions: **Destroy when 2 years old.**

10.   Record Series: **User Requests/Inquiries**

    Description:

         a.   **Routine requests for information and copies of replies which require no administrative action, no policy decision, and no special compilation or research for reply, excluding inquiries covered under item c.**

Instructions: **Destroy when 3 months old.**

b.   **Requests for information and copies of replies which require research or compilation of information to formulate an appropriate response.**

Instructions: **Destroy when 2 years old.**

c.   **Frequently asked questions (FAQs) and responses.**

Instructions: **Retain one reference copy of question and response until no longer needed.**

11.   Record Series: **User Feedback**

Description:

a. **Letters of commendation, complaint, criticism, suggestion, or other feedback, and copies of replies, on which no investigation or action was taken.**

Instructions: **Destroy when 3 months old.**

b. **Letters of commendation, complaint, criticism, suggestion, or other feedback, and copies of replies, on which investigations were made and/or action was taken.**

Instructions: **Retain until removal of the site from the Web, following a major redesign, or when 2 years old, whichever is earlier.**

12.   Record Series: **Superseded Version of the Site**

Description:

a.   **Following minor changes such as routine maintenance and calendar or news updates.**

Instructions: **Destroy upon completion of changes.**

b.   **Following major changes in design or information architecture.**

Instructions: **Follow disposition instructions for "Site Content."**

Web Site Content Records

13.   Record Series: **Site Content**

Description:

    a.   **Annual snapshot of all Web sites, by server.**

    Instructions: **Permanent. Offer to NARA when 25 years old.**

    b.   **Site deemed to have long term value. (Included, but are not limited to: Program, Field and Laboratory sites).**

    Instructions: **Archive with historical log documentation upon removal, redesign, or changes in information architecture. Destroy after 25 years.**

    c.   **One-time sites with a limited shelf life which only exist in an electronic format.**

    Instructions**:   Archive upon removal with historical log documentation.   Destroy after 10 years.**

    d.   **Sites deemed to have short term value. Include, but are not limited to calendars, conference-based sites, features, and news.**

    Instructions: **Destroy upon removal.**

    e.   **Interactive applications such as chat and bulletin boards.**

    Instructions: **Destroy or delete when 3 months old.**

    f.   **Site user aids.**

    Instructions: **Destroy when superseded or upon termination of the site, whichever is sooner**

14.   Record Series: **Electronic mail and Word processing System Copies**

Description:
Electronic copies of records that are created on electronic mail and work processing systems and used solely to generate a recordkeeping copy of the records covered by other item in this schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

a.   **Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recodkeeping copy.**

Instructions: **Destroy/delete within 180 days after the recordkeeping copy has been produced.**

b.   **Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.**

Instructions: **Destroy/delete when dissemination, revision, or updating is completed.**